**Assignment-2**

**Experiencing the platform evolution**

This platform has evolved so much in the last few years. The Dynamic CRM is now merged in Dynamic 365, which means it brings CRM and ERP under a single umbrella. Now it is much convenient for the organizations because they can avail all the required tools at single platform and they can opt as per their needs and have to only for opted tools.

Dynamic 365 is a more modular platform, means it has different modules available for each department of an organization. So, it is beneficial for the organizations as they do not have to spend extra money on the tools which they are not using.

With these Dynamic 365 modules an organization can keep the complete track their current and potential customer through their purchase history, survey response, contact preferences, current profession and other related data. Also, it helps to manage all the activities inside the organization Data analysis is used for all the collected data from different channels, to get the better insights and hidden patters which helps in making new strategies and planning, it helps the marketing department to run campaign on the basis of data which results in generation of more leads.

**Dynamic 365 for Sales**

This module of Dynamic 365 is completely dedicated for the sales department of an organization to streamline sales process. In this module sales department can keep the complete data of their leads and opportunities, it helps to convert the opportunities to order in a quicker way, as sales team would already having all the details of the lead. So, it would be easy for sales representatives to nurture a lead to opportunity and then convert it in an order, as representatives will be aware of all the potentials queries, needs and issues the lead might have, so representatives can prepare themselves before approaching a lead.

It will help to increase the number of opportunities and generate more qualified leads to approach. This saves the time and money because sales team will get more qualified leads, as the marketing will run the campaign on the basis of insights so it will bring only those leads which is related to that specific area in which the organization is providing services. For example: If a company is providing online cloud computing training, then the marketing team will run their campaign on the educational sites and educational videos on YouTube so that it brings leads who are interested in cloud computing rather than marketing on non-relevant platform. Data analysis insight helps to identify that which site and channels are used by most of the users.

**Dynamic 365 Application elements**

**Modular design:** Modularity means dividing a system into separate parts and all parts are independent from each other. These modules can be created and modified independently without affecting the other modules. This modular approach reduces the time and make the process more optimize. These modules can also share data as per the needs. For example, in Dynamic CRM, we have different modules for each department like sales, marketing, customer service and so on, all these modules are independent and comes under dynamic 365 so all the data and reports of any module can be accessed by other modules of dynamic CRM and ERP like Financial management, supply chain etc, which makes this modular design more useful and optimized approach.

**Entities:** Entities are the containers which is used to define and store the business data. With the help of entities, we can structure the data, create relationship and manage action on it. Entity is like table in a database which has various attribute, and the attribute are data items of the table which explain the properties of entity. For example: Student is an entity (Table, if we think in the sense of database) and it has various attributes like Name attribute, Roll no. Attribute, branch attribute. Attributes are like columns in database. We can There are three types of entities available:

* System Entities: It is used by the system to handle internal workflow and asynchronous job. System entities cannot be customized and deleted.
* Business Entities: It is used to store and manage business data. It can be configured as customizable and non-customizable. Customizable entities/attributes can be modified by renaming the name of entity, adding new attributes and changing various settings. Business entities are provided by the framework and can be seen in standard user interface. Examples of Business entities: Account, contact, letter.
* Custom Entities: Custom entities are not provided by the standard framework. These entities are created for adding the new functionality to the framework as per the business needs. These can be configured as customizable and non-customizable as well. For example: Nickname could be a custom entity, as we will having the full name in our data and we can extend it by adding custom entity for more accuracy.

**Processes:** Processes is used to model real-life business process, into the CRM. User can create and manage processes without any coding. So, it is useful for non-developers. User can update the process at real time so in this way progress can be tracked and system will remain up to date on the real time basis. Processes can be changed as per needs in future. There are four categories are available: Dialog, workflow, action and business process workflow.

Dialogs: This process is used to create a graphical interface for a process so that a user can use it in a more interactive way. They should be completed in one go once started. For example: User can create a dialog which act a guide for service representative through which he/she can track the case progress.

Note: Dialogs are deprecated and should be replaced by business process flow or canvas in power app. And the reason for the deprecation is that you cannot run dialogs using Dynamic 365 customer engagement web services, it can be run only in web application. Dialogs are not supported in Dynamic 365 for outlook.

Workflow: These processes are used to automate the real-world business processes and user can also configure it to take manual input also. These processes don’t use user interface, they run in the backend. They don’t not require to complete in one go, they can run over a period of time until they get completed. These processes work on the specific condition. For example: We have to create a workflow in which when an account is created then it automatically sends an email to the respective person in the organization. We will have three types of account which would be customer account, reseller account and ISV partner account. So, when an account will be created then the workflow will first check the condition to identify the account type then it will send an email to the respective person in organization like the account type is customer account then mail will be sent to sales manager.

Actions: It is a custom process which used to add customized operations which not available in the standard Dynamic 365 customer engagement, and it is also used to combine several operations in a single operation. New actions can be created with wizard-driven interface and through custom code also, however custom code is not supported for on-premises deployment. Whit the action we can invoke plugins which are custom component created by the developers. For example: Create, Assign, and set state in a single ‘escalate’ operation.

Note: It is not supported by the offline client.

Business process flow: It is used to visualize the business process flow, means it helps the system user to go through step-by-step stages of the process and it can be created by wizard-driven interface which is useful for non-developers as it is a drag and drop process which does not require any coding. So, user can track the progress of the process through the user interface. It is a collection of the required field of a process on the top of the screen. User can customize the process by adding or deleting a new stage in the process flow as per the require. For example: In sales process first the lead will come then it will be converted into opportunity if the show is interested otherwise, it will be marked lost. If the lead showed interest and it gets converted to opportunity then the Qualify stage will come and after that Develop, Propose and Close stage will come. So, all these stages will be visible on the top of the screen and user can simply use it by providing the required details.

**Dashboards:** Dashboard is used for visualization and analytics of the aggregated data in the system. It contains several components like grid, IFRAMES, chats and web-resources, navigation panel. It is mainly used for more interactive and user responsive purpose. We can see the results of the aggregated data on a single place with useful data insight based on data analysis. They are targeted to a specify module, user, team.

**Reports:** Reports provide all the useful data of the business in a structured and well-defined format from a user can easily retrieve require data. By default, these reports are based on SQL server reporting service report and it provides all the features like SQL queries and filtered view to retrieve the data. Filtered view means that it restricts the data to those people who are not authorised to access it. Access to the SQL server is not supported in Dynamic 365 CRM so it does not support access to filtered view.

There is another type of reporting called Fetch based reporting server report and it use FetchXML queries to retrieve the data. It does not have the issue like filtered view. You should have Dynamic 365 online or power app subscription to use this type of reports. These reports are wizard-driven, so it does not require a developer with extensive knowledge of SQL and Dynamic 365.

**The Extensibility options:** This Dynamic 365 platform is not only limited to itself; it is a flexible platform with various extensibility options available in the sense of functionality. This means that we can add more customized functionality with this platform. We can use third party extension which is available in Dynamics Marketplace as per our business needs for the customization.

**Exploring the Modular concept:** The main concept of Modularity is dividing a system in different parts, so that they can perform independently. The core of this platform is CDM (Common Data module). The CDM is like a common data centre where all the data of the platform is stored and all the apps and platform can use the data as per their needs. This concept is use for easy integration and sharing of data across various platform and apps by providing a set of common entities like Account, Contact, Activity, owner. All these entities can be used by all the modules. Panters and ISVs also use these entities along with their custom entities for their solution.

**Dynamic 365 Sales app**

It is the sales-specific module which is used by a sales team of an organization. It is used to build strong relationship with existing and potential customer. This module helps sales team to close the sales in a shorter way by tracking the progress and details of the customer. When you will have all the information of your customer at your fingertips then it will be easier for your sales representative to handle the lead and convert it in an order because you will aware of all the needs and requirement of your customer, so you will be prepared for it.

We can track complete progress of the sales and can manage leads and opportunities in more efficient way which results in increase in opportunity success rate. It also contains some sales-specific marketing operation like managing static and dynamic marketing list for quick campaign. So that a sales representative can also broadcast some required marketing emails. In this module you can customize your sales process as per your requirement and strategy, means you can add and delete the step in the sales process.

**Understanding sales-specific entities**

This module has all the sales related entities along with some common entities like Account, contacts etc which can be used by any module across the platform. The sales specific entities are:

**Leads:** Leads are the people/organization who show interest in your product and services. Leads can be a new customer who have never done any business with you before or it be an existing customer who is interested in your other product/service. For example, you went into an education workshop and you shared your business card and asked for their contact details too, so all those people who shared their contact are the leads. Now you can assign these leads contact to your sales team for the follow up. In this way leads can be generated from various resources like social media, websites, LinkedIn and leads can also be added manually by a sales person. Lead can have three stages which is New, qualified, disqualified. When a fresh lead comes who never done any business with you called new lead.

When the lead shows interest in your product/services then it is converted into opportunity and when a lead does not show any interest at all then it will become disqualified leads. Once the lead gets qualified and converted into opportunities then it is not necessary that it will convert into an order. It can be marked as lost too.

**Opportunities:** When a lead gets qualified, means if a lead show interest, then it converts into an opportunity. However, it is not necessary that only a qualified lead will convert into an opportunity, you can directly start with opportunity. It completely depends on business that how they want to start the process. An opportunity will already be having an account/contact so that a sales person can track it with phone calls, emails and all the other activities which were performed on the opportunity. So that he/she can take the appropriate action based on all the information.

Opportunities can be created in various ways like from spreadsheet, social media and other platforms which can be integrated with your application or you can create new opportunity manually. An opportunity can be marked as won or lost and all the reason and other related details can be tracked from the timeline. Once an opportunity is closed then it can be reopened for any correction or we continue with it if a lost opportunity comes back.

**Quotes:** When an opportunity is ready to buy your product/services then this quote entity provides the offer price and discount with terms and condition, along with modes of payments. We can add new price other than the price which is saved in the system for the product/services. A quote can be saved in 3 stages which is Draft, Active and Closed.

When a quote is created and it is still in progress then it will be in Drafted stage and when the quote is completed and ready to send then it will be in Active mode. If the offered quote is weather accepted or rejected then it be in closed stage. When a quote is created from an opportunity then it the products/services associated with the opportunities are added automatically. You can add and remove the discount according to you. The quote also contains dates because some offer and discounts are limited for a specific time, so all these details are present in quote.

**Orders:** When an opportunity accepts the quotes then it is converted into Order. Also, you can directly create an order as well by filling some required field like account/contact, product/services etc which are marked with red asterisks. After closing the active quote as order, you can also see the revenue on your order.

**Invoice:** When the customer makes the payment then you can generate an invoice for the order. Similar to order and quote, it can also be created directly for a direct order and it can fetch all the details related to the order. The details of the order can be modified before invoice is marked as paid. Once the invoice is done then the control is transferred to ERP system for financial process.

**Competitor:** This entity stores all the details of our competitor who is providing same product/services. It contains details like price of their product, offers which they are providing, their sales material and sales literature which contains list of prices of their product competing with us. With the help of all these data of our competitor you can make better strategies to increase your sale on the market. We can add this entity in our sales process also. You can track their strength and weakness and with this you can compare your product/service to convince your customer in more convincing way.

**Product:** This entity is part of product catalogue entity. It contains all the details of products/services like price, offers, discounts, which are being offered to customer. It can be associated with all the sales entities. It can be created, modified, disabled and deleted by the user; however, it is not recommended to delete any product because it could be associated with many older opportunities, orders, invoices. So, it will break the integrity of the data. It is better to disable the product instead of deleting it. Many products can be bundled together in order to provide more discount as compare to individual products.

**Sales Goals:** This entity is used to set target to increase the revenue of the organization. These goals are decided by managers and team leader are responsible to complete the goal within the given time. This is very helpful to track the progress of profit and it provides a more comprehensive view of the sales at every level like at team level and at individual level. So, managers and leaders can manage and plan their new strategies on these insights. You can set the time period to achieve the goal according to you.

Goal metrics can be set to specify a fix amount of goal to be achieve, it can be number of units and number of cases. You can make child goals, means sub goals. For example, a goal is set for the whole team then it can be further sub divided at individual goals. It can be tracked by the percentage that how much percentage is completed at which time and where you are lacking.

**Standard sales process:**

This process is based on Business process flow which mean user can create the sales process as per their business requirement. It allows the user to follow the predefined steps which is present in the process and user can also track the progress of the it from the visual representation on the top of the screen. Each step can be expanded to fill the required field and see actions which has been performed. By default, there are 2 types of process, however you can modify the process according to your business needs like you can add and remove steps, rename existing step, define new fields of data to be captured.

**Lead to opportunity sales process:** It a process to convert a new to lead into an opportunity. These processes define data that need to be captured in order to convert a lead into an opportunity. A process can go through several entities. This process starts from lead entity and goes to opportunity entity. Each stage is will be associated with only one entity.

In this process it starts from creating a new lead then after working in that lead it gets converted into opportunity and then it goes to develop stage which use all the details associated with the leads and collect additional information of opportunity. In this stage we understand the customer’s needs, proposed solution and the stakeholder for it. This stage includes pricing, revenue, estimate time, adding product/services.

Now the process will go for the next stage called propose in which quotation is proposed to the customer and when the customer accept the quotation then you can create order and after then invoice can be generated in this stage. After that closed stage includes won or lost details.

It is not necessary to follow all the stages of the sales process you can start from any stage.

**Sales Literature:** It is like a guide which contains all the information about the products and services. It is used the sales person so that they can provide maximum details to the customer and all the information are present at a single place so it handy for the sales person. Each literature can include one or more individual sales attachments. The sales attachments records contain all the metadata of the document which is attached to sales literature.

**Leveraging sales reports:**

Default installation comes with a demo report to start. These reports can be application specific and general reports can span across the multiple application. You can customize the reports as per your own needs. The standard reports revolve around account and contact, as well as activity, leads, sales history and sales pipeline.

**Marketing features:**

This sales module also includes some sales specific marketing features like sales person can make their own marketing list and generate quick campaign. This helps a sales person to contact a group of customers and it increase the interaction. You can create two types of marketing list in it which is static list and dynamic list.

In static list you cannot change the contacts after its creation and in dynamic list it changes the contacts list every time by running a query based on some specific parameters.